Decisions

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1982: YEAR OF MEDIA CHANGE

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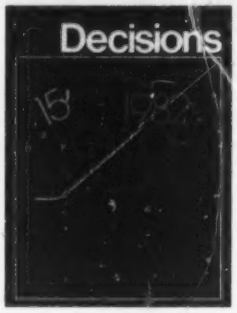

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MARKETING & MEDIA DECISIONS (ISSN0195-4296) Special issue, Copyright © 1981. Decisions Publications Inc. Published monthly. Executive, editorial, circulation and advertising offices at 342 Madison Ave., New York, N.Y. 10017, (212) 953-1888. **Available** without charge to key media personnel and others concerned with media decisions in advertising agencies and advertising companies. For others, subscription prices are: U.S.A. and Canada, $36 one year. This issue $5.00. Overseas subscriptions are all paid at above prices plus $40 per year to airmail, if airmail is desired. Controlled circulation postage paid at Burlington, Vt. **Postmaster:** Send form 3579 to Marketing & Media Decisions, 342 Madison Ave., New York, N.Y. 10017

AUDIENCE 82

The demo revolution

Dawn Sibley, senior vp-director of media, and Joel Fisher, director of media research, at Compton Advertising, point to the expansion of 35-44 segment to 42% of the population — and analyze the epochal marketing significance of this.

We stand on the calendar's edge of an electronic revolution as great as any that has preceded it. It is a revolution that goes by several names: Cable TV, Video Cassette Recorders, Teletext, DBS, New Electronic Media. All of these will affect people and marketing in the 80's. *But even more important to marketers will be the changes affecting the composition of the population itself:* age, income, education, family size, ethnic growth, work status, etc. It is those changes which we will address.

For it is they, more than any others, that will affect the sales of products and services.

Aftermath of baby boom

By far, the single most significant factor to affect us during the forthcoming decade occurred many years ago from the late forties to the early sixties. During this period, this country was the subject of a baby boom of unprecedented proportion as some sixty million births were recorded. From that point onwards, the composition of our country was described by the evolution of this population segment.

Our obsession with this group is understandable as it remains the most densely concentrated age segment of our people. Hence, until recently, we have been described as a young country. But as time marches on, so has the movement of this group within its life cycle. The aging of this group has graphically been described as "following a pig in a python", as we watch it slowly but surely move upward through the age ranks. While it is estimated that the total population will increase by some ten percent over the decade, the 25-44 segment will increase 25 percent as its ranks will be swelled by the baby boom era's population. An even more dramatic growth will be recorded by a subsegment of this population: the 35-44 year olds, who will increase 42 percent.

This is highly significant to the marketer since the 25-44 age segment is the expansive stage of people's lives.

It is during this period that people begin families and purchase all the goods and services necessary to support and sustain their households. This will affect all aspects of life and business as these people seek to satisfy

Dawn Sibley

Joel Fisher

their needs. Homes need to be purchased, clothes need to be bought, and detergent is required to wash those clothes in recently purchased washing machines.

The 25-44 age segment will not be the only one to reflect significant changes during the 80's. Of great importance will be the declining representation of the younger segments of our population.

At the same time, there will be an increased representation by the older age groups. One out of every eight persons will be 65+ and there will be over twelve million 75+ year olds. Logically, the focus of marketers in the 1980's will shift away from teens and young adults and lean more heavily towards the older and more mature segments.

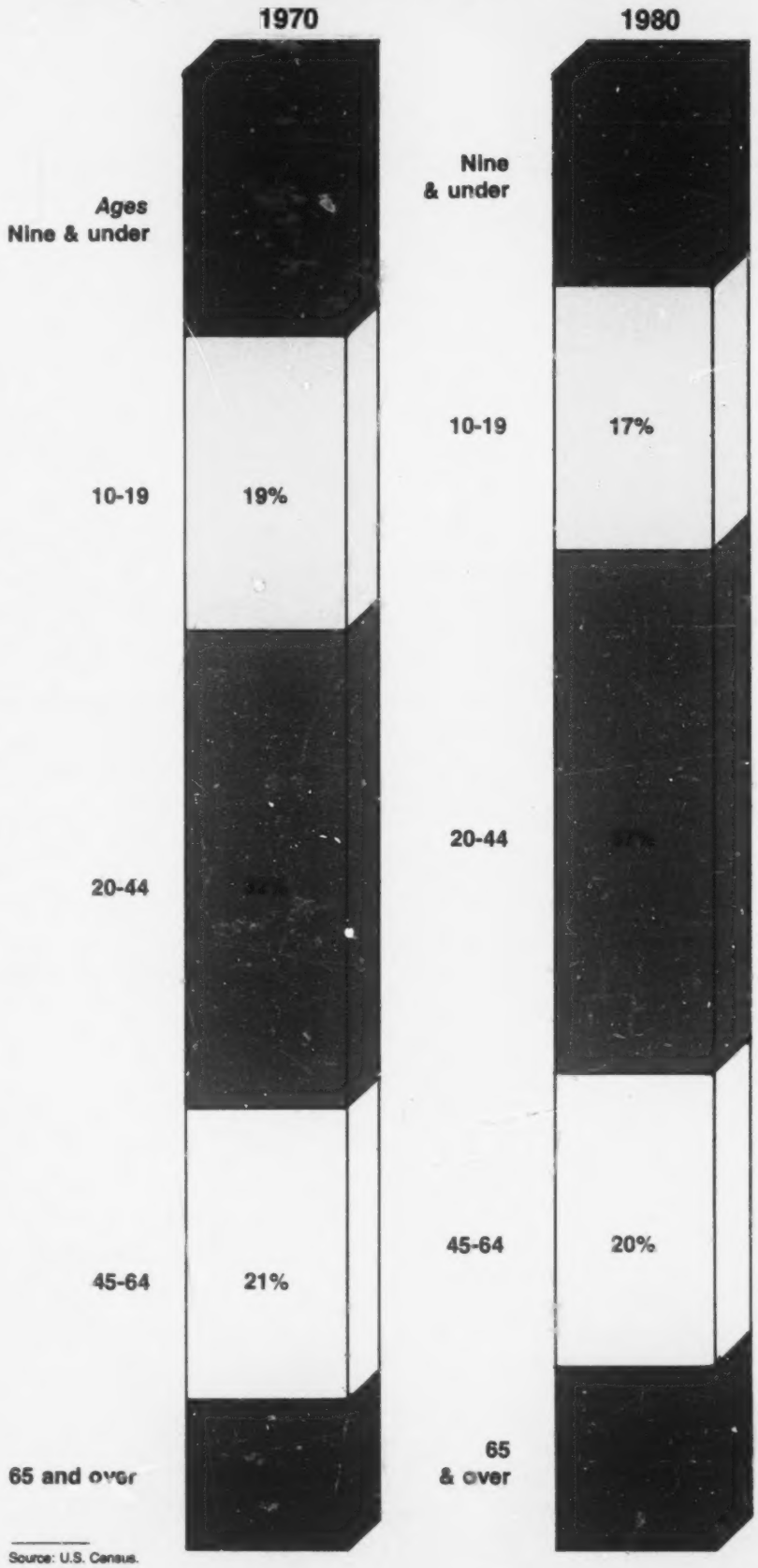
11 years of widowhood

Part of the reason for this aging of our population is illustrated by data concerning increased life expectancies. The average life expectancy for someone in 1990 will be three years longer than in 1980. The average life expectancy will be 76: 72 years for men, and 81 years for women. Since women tend to marry older men, and as we already saw, men die younger, on average women should expect eleven years of widowhood. Hence, there will be a very significant single unit, elderly female population segment in our population during the 80's - a phenomenon that alert marketers should be aware of.

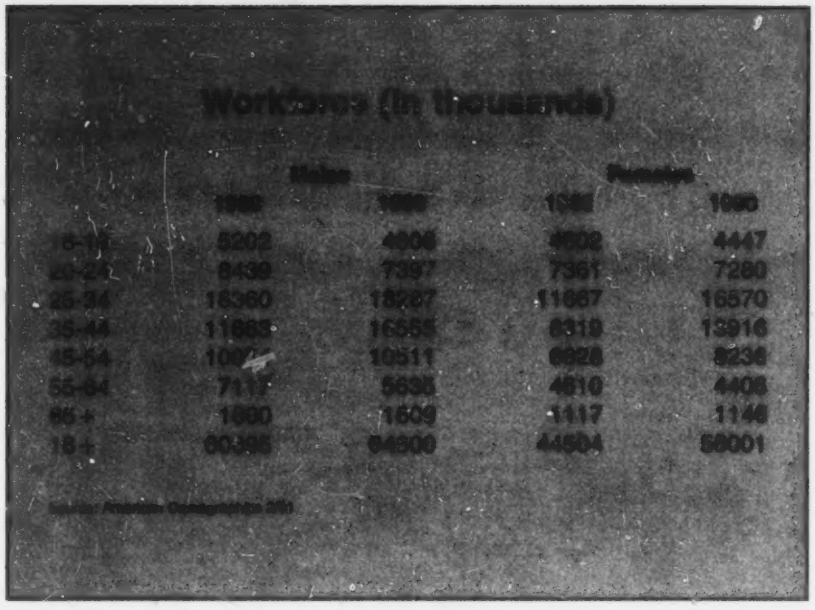
For the most part, it is difficult to ask any researcher or planner to prognosticate. Generally speaking, the exception to this rule concerns population age segments as it is relatively simple to track it from one decade to another. Other than immigration (expected to run at 400,000 per year during the decade), there are few surprises. Actually, the only room for any debate concerns the yet unborn. And just how many births will take place during the 80's is open to question.

Most experts agree that the birthrate (and consequently, average household size) will continue to decrease. The typical woman plans to have 2.1 children which could prove to be demography's *invisible hand*. By that we mean, that level of propagation which is needed for natural replacement (os-

U.S. population is getting a little older



Source: U.S. Census.



tensibly, zero population growth). To illustrate the degree of the drop in the birthrate note that in 1960 the average household size was 3.3 people, in 1970 it was 3.1 and today it is 2.8. But by 1990 it will be at an all time low of 2.4 people per household.

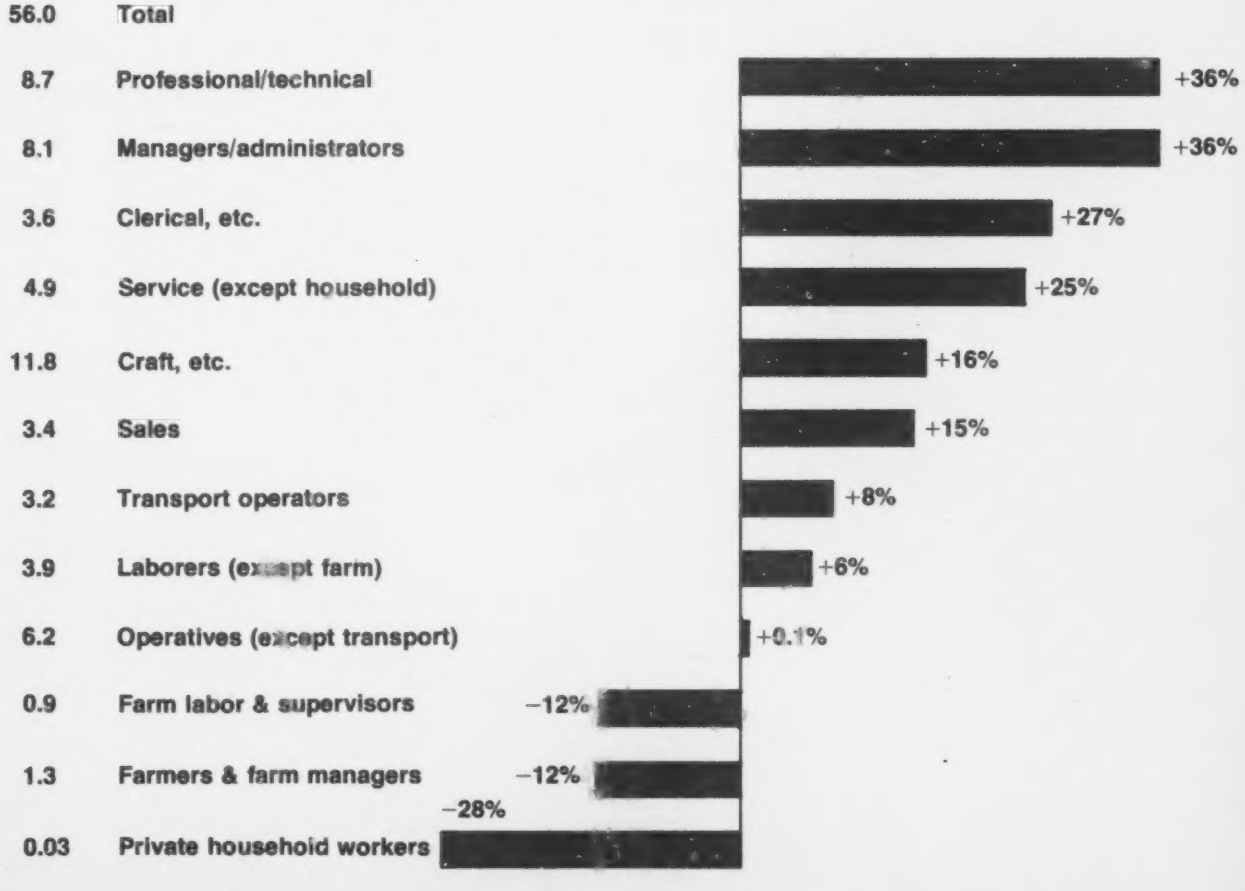
The never nesters

A large portion of this birthrate drop can be attributed to a growing segment of the population described as *never nesters;* men and women who do not plan to have any families.

Of equal importance is that many adults are marrying later and starting families even later still. Sociologists have offered many reasons for this phenomenon of which the most often cited are: effective birth control, the high cost of raising a family. Childlessness has become socially acceptable.

Changes in occupation 1972-1980

Workers in 1980 (in millions) **Percent change 1972-1980**


56.0 Total
8.7 Professional/technical +36%
8.1 Managers/administrators +36%
3.6 Clerical, etc. +27%
4.9 Service (except household) +25%
11.8 Craft, etc. +16%
3.4 Sales +15%
3.2 Transport operators +8%
3.9 Laborers (except farm) +6%
6.2 Operatives (except transport) +0.1%
0.9 Farm labor & supervisors −12%
1.3 Farmers & farm managers −12%
0.03 Private household workers −28%

The migration to the Sun Belt, also a major change, includes young people.

The Northeast, while losing numbers of people, will be left with younger and richer people. Also, marketers who concentrate their advertising in the top 50-100 markets will find their effort reaching smaller percentages of their target markets as the population shifts to less densely settled areas. The difference between markets 45, 75 and perhaps even 105 will not be as great in 1990 as it is in 1980.

Coupled with the aging of population will be a general enrichment in terms of available discretionary income. *Our population will be richer.* Median income adjusted for inflation will increase 13%. The number of homes earning $25M+ will increase from 23% of the population (1980) to 33%(1990) and this segment will account for 60% of all disposable income.

As such, low price (i.e. generic products) will not be as attractive. Instead, people will be looking more and more towards quality products. There will also be more money for non-essential luxury items and particularly (electronic) gadgets. A rising share of income will become available for discretionary purchases - especially those which will save people time doing household chores. For by 1990 people will be more concerned with leisure time and activities than ever before.

This will be possible since, besides making more money, people will be working fewer hours. In 1990, over half the workforce (53 percent) will be employed in white collar professions. (Note: the 70's were called the computer decade, the 80's are being called the information decade.) These people will be working a 35 hour week instead of 40 hours typically worked by blue collar laborers.

Glut of professionals

Interestingly, the workforce will be expanding twice as fast as the population. A by-product of this growth will be a glut of professionals. Frankly, there will be more professionals than the economy can absorb. This will produce a good deal of frustration on the part of those forced to accept employment at professions whose needs do not match the educational achievements attained by this group. They, however, will not be the only ones to feel frustrated. Even those who do attain professional positions will not do as well, or go high up the corporate ladder, as they had hoped.

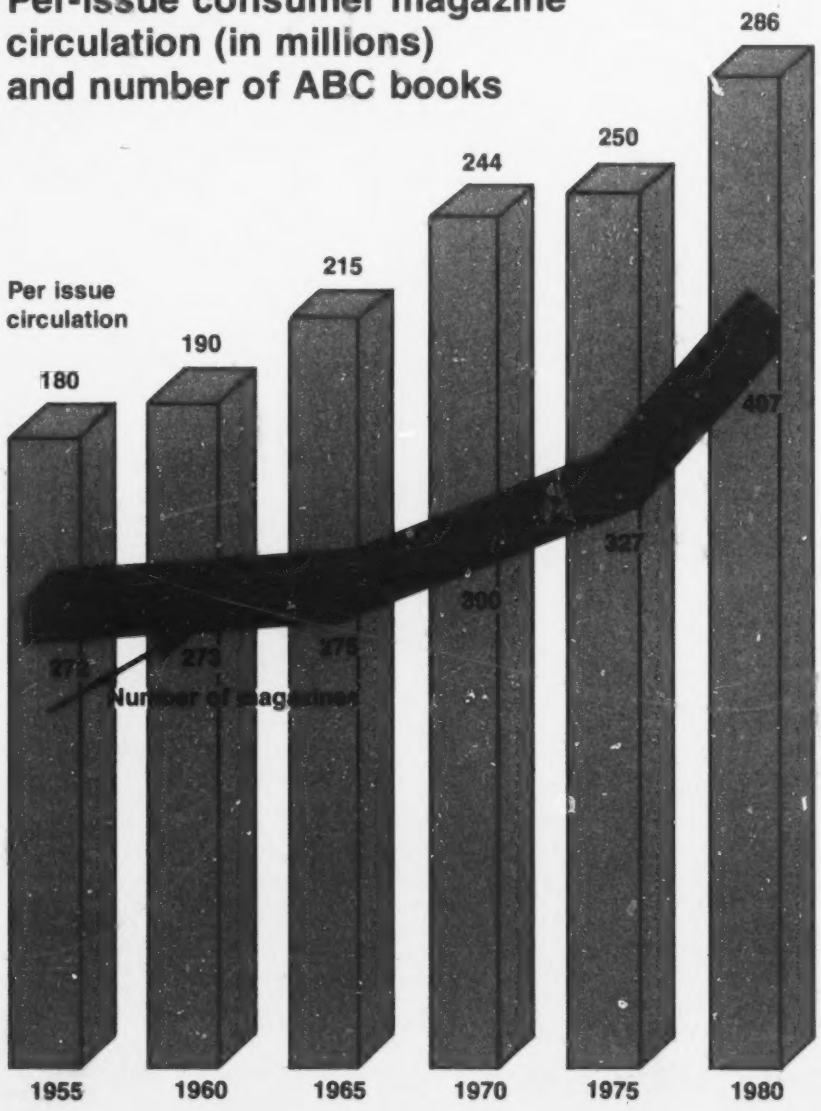
The reasons for this are twofold. Firstly, legislation will be passed postponing the mandatory retirement age. People who choose to work longer will be able to. And many will choose to since inflation and anticipated increased life spans will create a need for more money than retirement offers.

It is people who do not retire and who are holding onto top management positions who are creating a log jam for those who seek promotion. Also, since there are so many 25-44 year olds, the age at which promotion to higher levels are actively pursued, the competition for the few available promotions will be great.

As previously mentioned, the workforce will expand significantly - there will be some 10-20 million more employed people in 1990 than 1980. Not unexpectedly, the majority of the influx into the workforce will be accounted for by women. Approximately 77% of the workforce will be women - and they will be attaining better, more responsible and higher paying positions than in the past.

By 1990, however, women will still constitute less than half of the working population.

Per-issue consumer magazine circulation (in millions) and number of ABC books



Source: Magazine Publishers Association

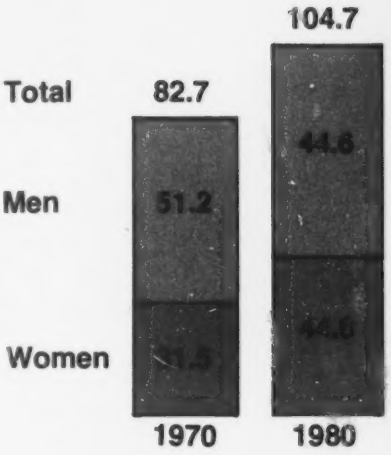
The greatest bulk of the growth in the workforce will be made in the first half of the decade. From 1985-1990, the growth of the workforce is expected to decline to 1.1% yearly. The better fields for prospective job applicants will include: accounting, banking, medical, engineering, geology and data processing. The problem professions include: teaching, forestry, historians, librarians, mathematicians and journalism. A word to the wise-beware!

Because there will be more women working and more single unit (male) households, retailers will have to remain open longer to accomodate these people's shopping needs. The supermarket will also undergo a metamorphosis and will evolve into a shopping center. It will offer food, clothes and hardware. It will also offer restaurant and concession services as well as babysitting so that families will be able to make a night out of marketing.

As professions become more complex in the 1980's and as women, in particular, strive for higher level positions, the need to attain greater levels of education will increase as well. In 1965, only 18% of the population had any college education. By 1980, that figure rose to 27% and by 1990, we project that 35% of the population will pass through a college door for some period of time or other.

This exposure to academe will serve to do more than allow people to compete for more responsible jobs. It will also produce consumers more sophisticated than today's. They will be more receptive to new products and more demanding of quality and performance.

Ethnic groups will represent a vital segment of the target audience. By 1990 Blacks and Hispanics will account for almost 20% of the population. Hispanics, who will account for an estimated 7% of the population, are the fastest growing minority group in the United States. This group appears to be holding onto its ethnic character and language; therefore, specialized marketing efforts will have to be fielded to reach them.



All of this points to fractionation of key consumer groups. The typical package goods target of women between the ages of 18-49 may be supplanted by a new target consisting of women and men 25-44 years old, living in households of three or more, plus adults 25-44 in Hispanic households.

This expanded target audience may, however, be unrealistic because it may not be affordable.

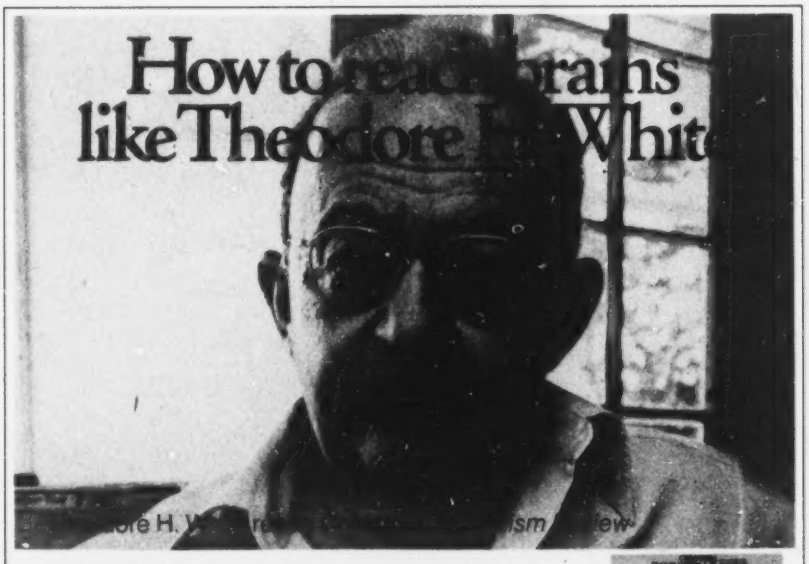
Media inflation, compounded by the anticipated audience fractionation resulting from cable penetration, pay tv and video home recorders, is going to make it difficult to buy the mass audiences we were used to, much less extend audiences. Advertisers will probably have to cut back or refine targets to those groups most crucial to a product's sales and growth.

On the plus side is the fact that cable, because of its current trend towards special interest programing (news,sports, etc.) will allow an advertiser to zero-in on prime prospects via interests and psychographics rather than the traditional demographic route (example: cooking shows for food products). This could assist marketers in eliminating media waste in addition to placing their messages in more persuasive/relevant environments.

Defining, appealing to and capturing these new targets are going to create real challenges for the marketer of the 1980's.

The leg work must begin now!

Dawn Sibley
and Joel Fisher



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targeted at certain lifestyles all make possible the more precise targeting of marketing efforts.

Satellite transmission of messages is a relatively inexpensive way to talk to people nationally at a time when media costs threaten to freeze some advertisers out of the mass media. Via satellite new speed and immediacy are added to commercial communication.

Reach and frequency will be moved to a back page in media plans, but they will still be required as back-up. The lead-in to media plans will be media-oriented analyses of marketing opportunities for individual brands in carefully selected media/market segments. And the guts of the plans will be the rationale for effective communication against specific goals in awareness, brand preference, sales.

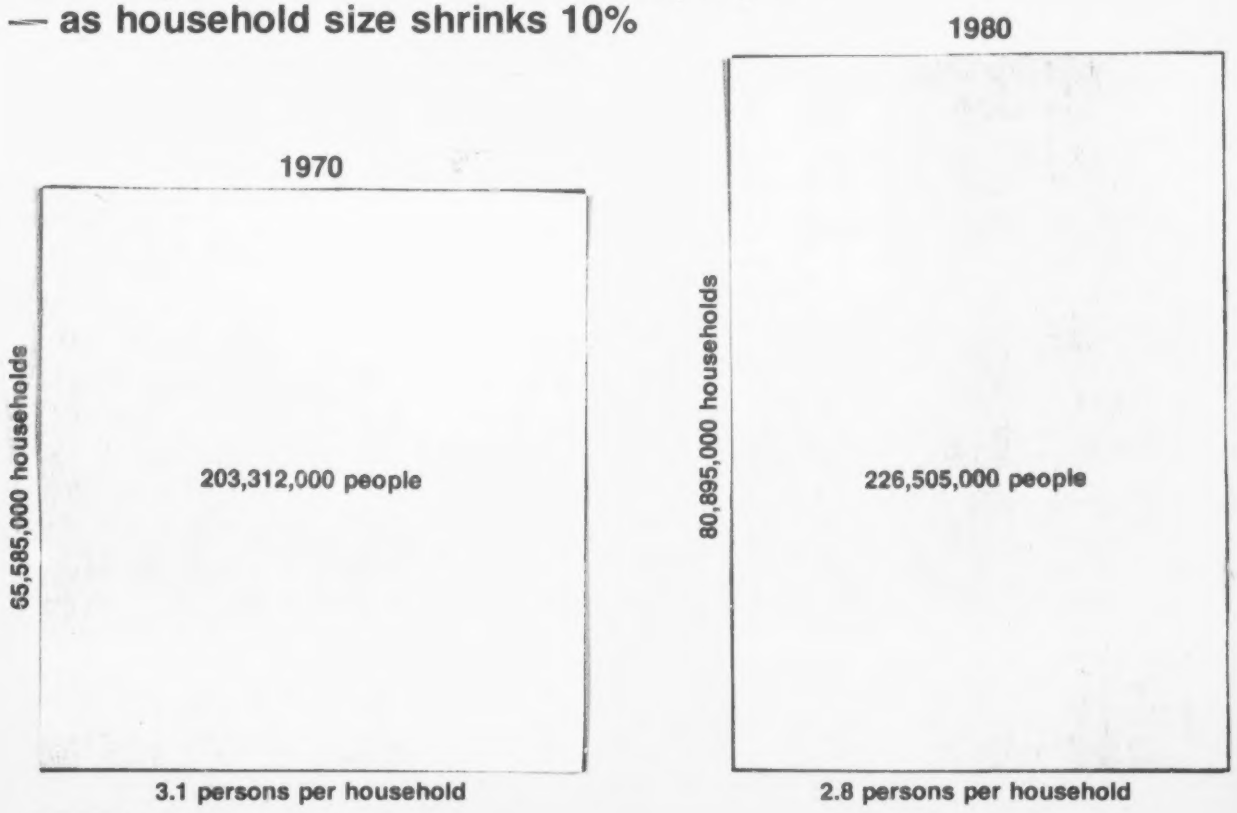
More than facility with numbers will be required of media people in the years ahead. They will have to be marketing-oriented, able to present their plans for media expenditures directly to brand managers. They will have to be up-to-date on new media options — and capable of stating the pros and cons in terms of the brand they're assigned to. They will have to be innovative to the point of daring — with a knack for selling new ideas.

Practical forecasting is the objective here and we have attempted to keep the forecasting feasible by asking the contributors to concentrate on just the year ahead — 1982. But in some cases — in order to look at 1982 — the seers have been forced to talk about the years beyond. Experiments in two-way cable, satellite networks, the paint guns will be facts of life in 1982, although some may turn out to be fallacies before the end of the decade.

It will be an interesting year for brand managers, media experts, salesmen, researchers and advertising reporters.

Carroll Swan, editor

Greater growth in households than people — as household size shrinks 10%

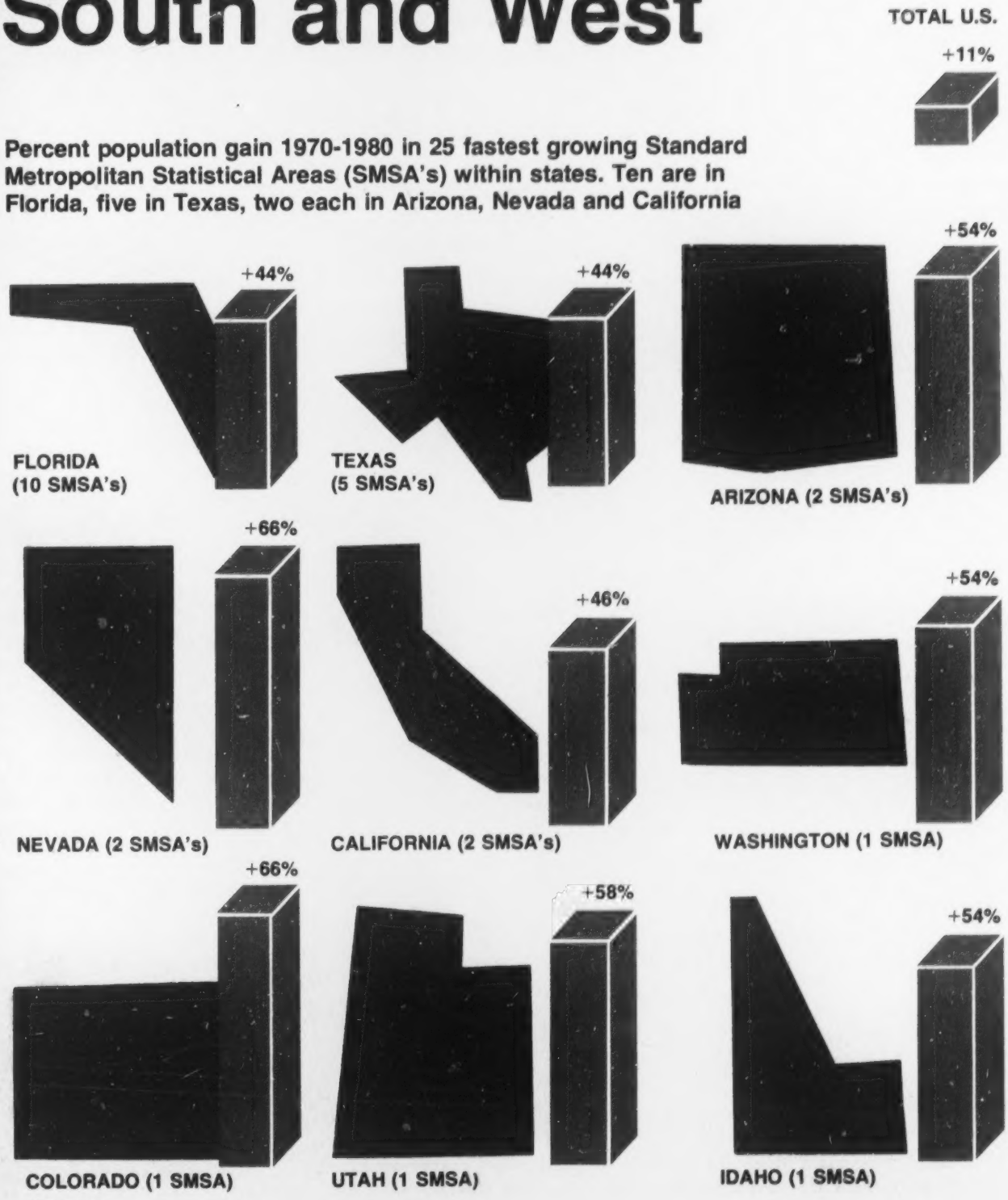


Source: U.s. Census Bureau.

AUDIENCE 82

Metro growth is South and West

Percent population gain 1970-1980 in 25 fastest growing Standard Metropolitan Statistical Areas (SMSA's) within states. Ten are in Florida, five in Texas, two each in Arizona, Nevada and California



Source: 1970 and 1980 U.S. Census

to do about this? Call me right away."

It was firedrill time. A hasty meeting was convened and it was decided that the test market roll-out should begin immediately. This was two weeks in advance. Literally dozens of parties had to be informed and their approval sought. Tom concentrated his efforts on three important lynchpins in the process: the agency, manufacturing, sales and merchandising. Assistants took up other roles.

Tom recalled the frightening conversation with the media director, Langley:

"Tom, I just don't see how we can meet those planned weight levels on such short notice. You're talking about getting a CBS affiliate in Houston and one in Phoenix for four weeks in prime during the fall. Those guys are totally sold out. Now we may be able to get ABC and NBC there and throw in a couple of indies, but I don't think the demos will pan out."

Tom asked him to figure a plan that would incorporate those other stations but also to put the heat on the CBS stations.

Meanwhile, Tom put through a call to Cereal's general manager. He explained his problem with media and asked if it would be possible for HoneyNut Oaties to utilize spots pre-sold to other Dynamo cereals on the CBS stations in Phoenix ahd Houston during those two weeks. The general manager said he would consider it and get back to him.

The next day Tom got a note from the general manager's office. It detailed how many of these spots could be relinquished without damaging the marketing plans of his other cereals. It worked out to be less than half of what Tom needed.

About an hour later Langley called. "I've got good news. My friends at KHOU and KOOL said they could help us out. Apparently they gave some of their other advertisers two-for-one deals in spring so they could fit in HoneyNut Oaties. They said Dynamo was too good a customer to screw up."

Phoenix and Houston scooped up Honey Nut Oaties. It was the hottest thing to hit those towns since Mr. Goodflakes had tested there.

In fact, it was too hot. Suddenly supermarkets were struck by a product shortage and Tom had to get the factory to speed up manufacturing to meet demand.

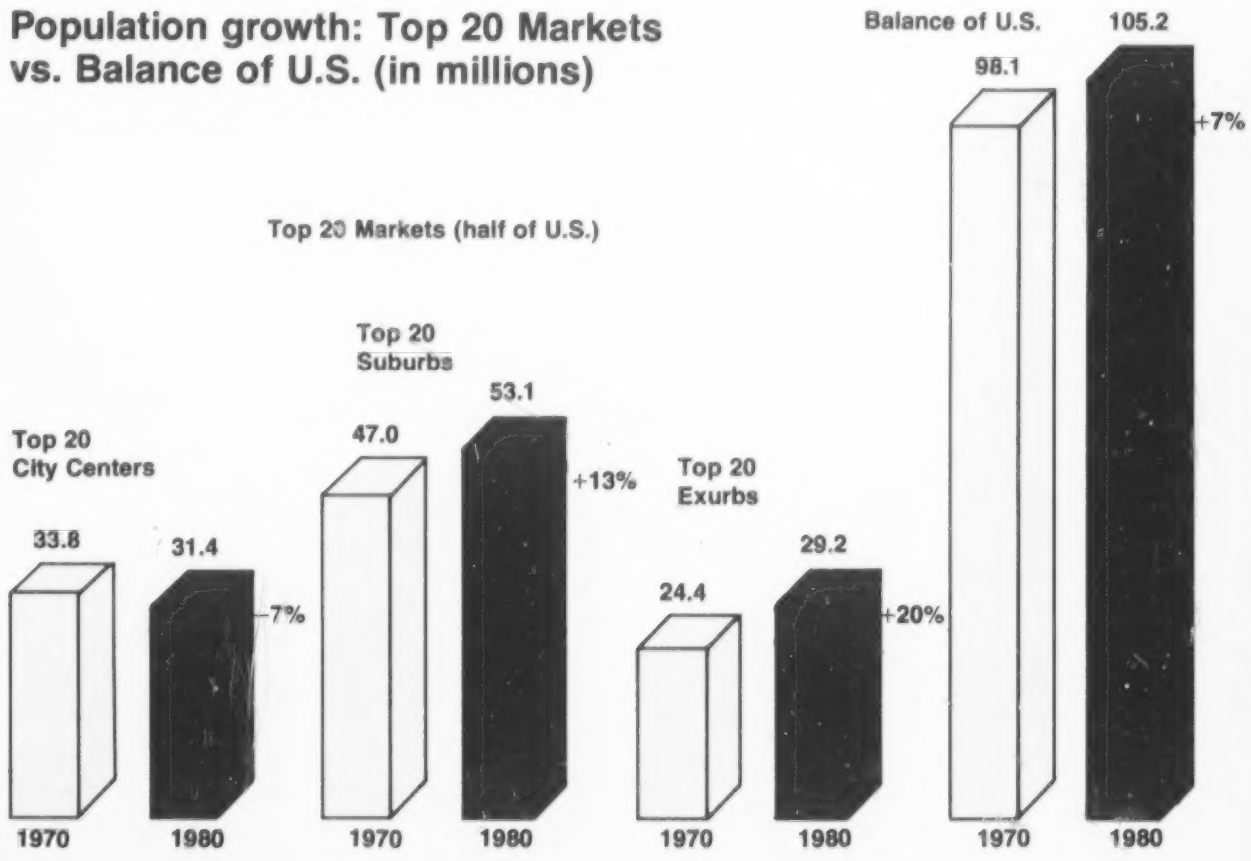
After the four week test Tom and his staff settled in for the long haul. But with the critical test phase behind, brand management had a clear view of the winding road that lay ahead.

One day early in the winter Tom got a call from a headhunter. Would he be interested in talking to another cereal manufacturer about a position as group product manager?

Tom declined. He decided to wait for that call from the division vice president about the general manager job.

Verne Gay

Population growth: Top 20 Markets vs. Balance of U.S. (in millions)



Source: Decisions estimates based on census data.

prepared for advertising careers and are from more prestigious schools.

"I don't know what has perked up the interest but I always have a stack of resumes and they are from sharper kids with more education," he said.

Even those on the job for several years are finding that they must do their homework. More in-house material about new technology is being circulated at the advertising agencies. Trade magazines have become more heavily used sources for media people who need to keep abreast of the rapidly emerging technology.

Further education outside of the agency is also in greater demand, they said. One source indicated however, that media people were discouraged from pursuing, for instance, a Masters in Business Administration because they might leave media for account work.

But the problem of losing media people to other parts of the business is not so common today as it was before because fewer media people are eyeing account jobs as media begins to play a more central role, the young media people said.

"There's no question that the people entering the field are changing," Talbott summed up. "There was once a difference between account and media people. The best and the brightest went into account work. Now we are all in the same group, working as a team. It's no longer a field that you move into account management from."

Talbott admitted that she was one of the young media hopefuls who want to impress management enough to leap into account management. But she has decided to stay put after finding out what media is all about.

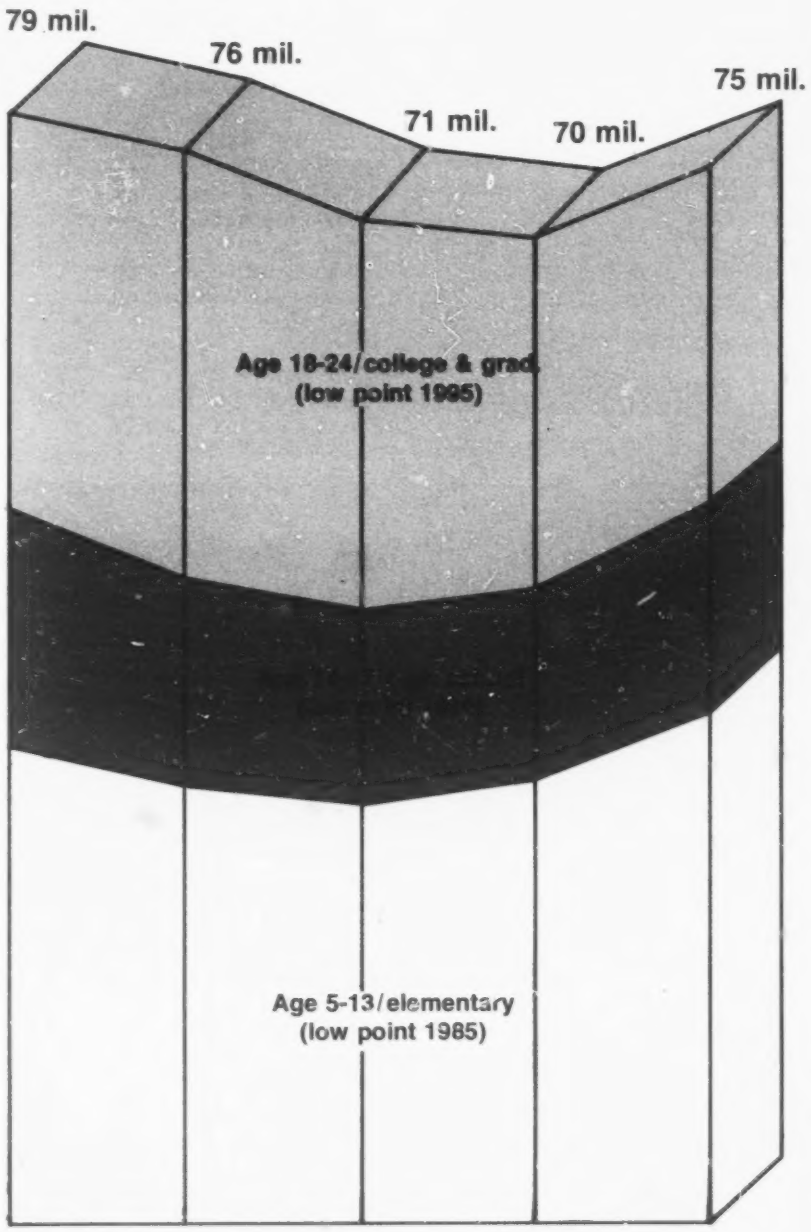
One dark side is that while media people are assuming more responsibility, salaries and positions are lagging. One person said it is annoying that the account executive dealt with is a vice president but the media person is not. The general feeling is that salaries are "decent", but not up to par with account managers — at least until media people reach higher levels.

Another source ended on an unhappy note, indicating that media people will never be thought of as more than mindless numbers wizzards until salaries and titles are upgraded.

Rebecca Fannin

School age population (in millions)

Post war babies are now having babies who will boost school population after 1985.



1975	1980	1985	1990	1995	Age
28 mm.	30 mm.	28 mm.	25 mm.	24 mm.	**18-24**
17	15	14	13	15	**14-17**
34	31	29	32	35	**5-13**
79	76	71	70	75	**5-24**

Source: U.S. House of Representatives, Select Committee on Population

AUDIENCE 82

Changes in audience research — not in media audiences

Marcella Rosen, senior vp-media director, NW Ayer, sees 1982 as a year of normal evolution in media audience. The big changes next year, she says, will be in media research.

The purpose of this thirteenth issue of Marketing and Media Decisions is based on the assumption that 1982 is going to be a crucial year in the media industry; a year, if you will, of media-at-the-crossroads. I do not agree fully with this premise.

It is certainly safe to say that during 1982 most of the trends which have been developing over the last several years will continue. Another million homes will be wired and cable penetration will jump by another 2%. The share of viewing controlled by the networks will slip another point or two.

Two or three major cities will see their evening newspaper quietly fade into history. And we could even see one of our major magazines publish its last issue.

One certainly does not need a crystal ball to make those predictions; they are merely the next chapter in an unfolding saga. Most likely these trends will continue for several years with few major breakthroughs or losses by any media type. So, from a media point-of-view, 1982 promises to be more of the same.

There is one area, however, in which 1982 should be an important year: media research.

While media thinking has barreled full speed ahead into the 1980's, media execution has lagged far behind, still mired in the 70's. While we have paid extensive lip-service to every new idea, relatively few advertisers are involved in the new electronic media, few advertisers have shifted major funds from broad reach to selective media, and few advertisers have readied themselves for future usage of burgeoning media ideas.

The reason for this gap between thinking and execution is due mainly to a lack of suitable media research. If we are to narrow the gap it is imperative for media research to put the problems of the 70's behind, move rapidly to confront the new media thinking and lead us into the 80's.

Realize that during 1982 we will eclipse the one-quarter mark for the decade. At the close of the year, the 80's will be nearly one-third complete. It is time that we, who were prediciting major changes in media for the 80's begin to turn those prognostications into reality. For this reason, I think 1982 will focus on bringing media execution into the 1980's — and on preparing ourselves for the major changes which will result from minor changes year after year after year.

Media research will surely be leading this venture. Three specific areas will be of special importance as we enter 1982:

(1) Amelioration of the audience research chaos.

(2) A welcoming of new ways to analyze media audience habits.

(3) A closer scrutiny of developing trends.

1. Audience research: This is a problem which has spanned all media types. In 1982 the magazine research situation should finally be improved: and a workable solution to future television viewing research must be found.

The magazine industry has been faced with a crisis in credibility for several years as SMRB has offered numbers which have been "massaged" and MRI has offered numbers which seem a bit "large."

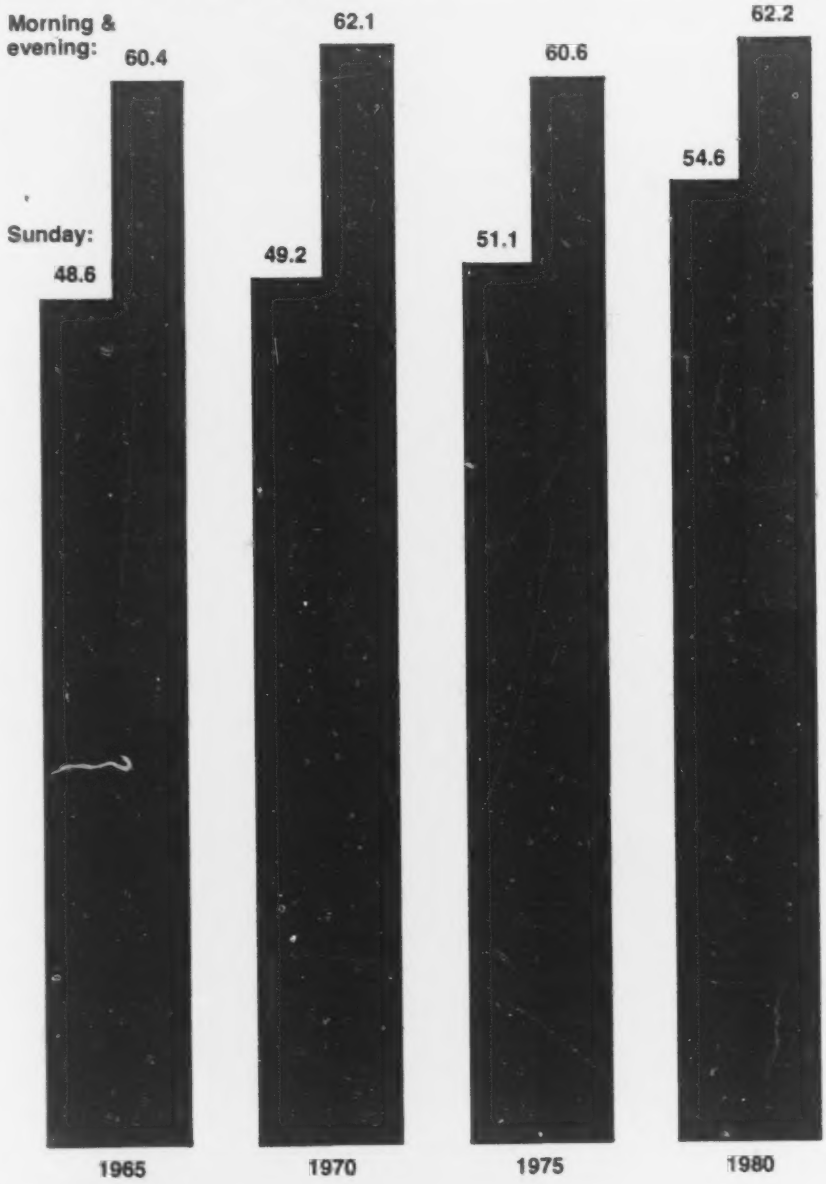
In response to the guidelines established by the AAAA Committee, SMRB has responded with a technique that will measure all magazines by one methodology. The entire industry has participated in the process of selecting and refining this methodology and it seems the users are finally becoming a part of the developmental process.

MRI will once again be a factor as they, in 1982, will have comparable product data available. As you may recall, this service did not provide any product usage data for two waves and will not have a full year data available until fall 1982. This full service availability will keep MRI a factor in the magazine research field; a real alternative to SMRB.

Thus, there will be improvements in both services in 1982. No longer will we have the "calibration controversy" of past years nor the negative of no product data. Both services will use one, albeit not the same, methodology. Both services will offer product data. Both services will measure over 110 magazines. The only real discussion left is what factors constitute a reader: the SMRB screen or the MRI all inclusion technique.

In 1982 Starch INRA Hooper will make a final decision on whether or not to launch their proposed study. We, at Ayer, applaud their creativity in attemption to find a new solution to a very old problem. We find it refreshing that they have returned to one of the basic, yet recently ignored, elements of research — the test. For three

Daily newspaper circulation (in millions)



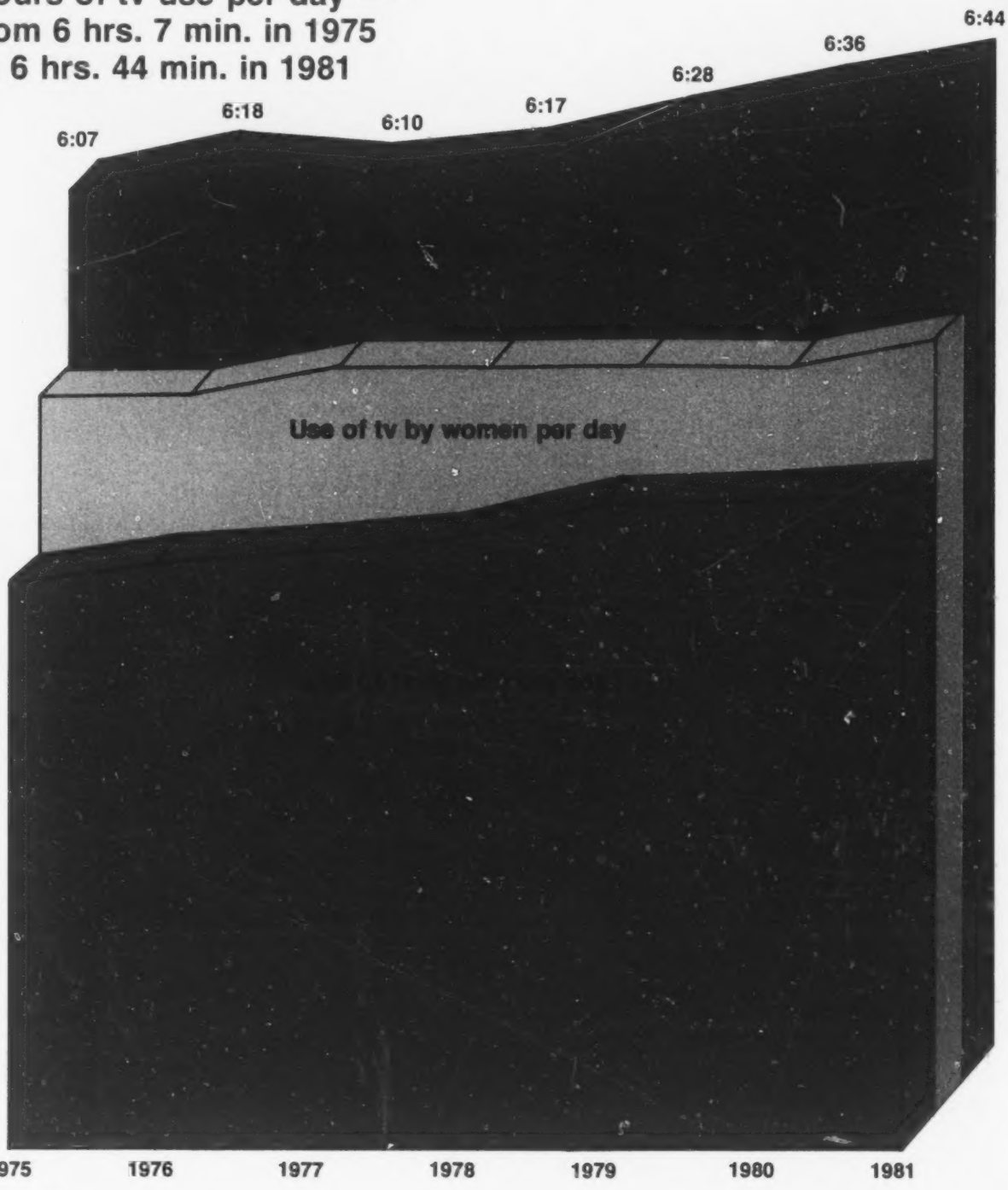
Source: Newspaper Advertising Bureau.

years we, as an industry, have invested million of dollars while SMRB has, in effect, tested assorted methodologies and adjustment techniques. Starch may not be the ideal solution, but we will at least be left with test results that can be evaluated and judged at an affordable cost.

SMRB, MRI or Starch? Through-the-Book, Recent Reading, Calibration or Front Cover/ TOC? The options seem boundless. One way or another I think the research chaos of the last several years will finally get better in 1982.

Magazines will not be the only area where research will be resolved in 1982. I think major emphasis will be placed on getting information available for the New Electronic Media (NEM). The media industry has been actively promoting the NEM. I'm certain we all agree that it is the medium of the future. But its growth is going to be se-

Hours of tv use per day — from 6 hrs. 7 min. in 1975 to 6 hrs. 44 min. in 1981



Source: A. C. Nielsen and Decisions estimates.

verely limited by the lack of available research.

It is just not realistic to ask our clients to invest major advertising budgets in media we have no proof is attracting an audience. Cable television has probably reached a saturation level of advertisers who are willing to take a chance on the future of the medium. For cable to experience any more real growth in advertising support, research on effectiveness will be imperative.

The Ad Hoc Cable Measurement Committee, the industry group trying to find a workable solution to measuring all the video options, is making progress in this area. It is a positive sign that those of us who are demanding and paying for the data are finally getting involved in the early stages of research. In this way we can obtain the type of research most useful to our industry.

I think one point is painfully clear: we must not be strapped with the old methods of gathering research for traditional broadcast. A family diary may not be a feasible alternative as television viewership becomes more and more individualized. I would like to see us explore the possible use of interactive systems which can provide information beyond just the audience generated by a program. 1982 will be the year in which we will have to get this kind of problem resolved so that we can move the industry into all the media options available.

2. New Analytical Methods: In 1982 media research will have to begin to analyze new forms of data, such as that offered by PRIZM.

We are actually on the threshold of a fourth generation of media data. First there was circulation and household viewership information, followed by the more refined audience data replete with demographic information. The third generation was made available through the growing use of computers, extensive cross-tabs of demographic and product usage data. All of these aspects have been linear in nature and have not begun to delve into the important aspect of lifestyle. PRIZM, and the companies which will rise to compete with it, will offer this important and insightful knowledge.

With this kind of information now available, it is not practical to ignore it. The same wait-and-see attitude we take with new magazines is just not possible with new research information.

In 1982 PRIZM will be on us full force. Media research must instruct media personnel and clients in the proper use of these data and begin to explore ways it can be used to improve our media solution techniques. This looks to be the media research tool of the 1980s and will have the added benefit of reducing our dependence on the myopic view which the audience research data provide.

3. Developing trends: In 1982 the media world will realize that constant monitoring of audiences is mandatory. Patterns which used to take several years to develop now impact on us in a matter of months. The Sony Walkman is a graphic example of this. Just when it appeared that radio usage had reached its level of saturation, along comes the Sony Walkman to make radio even more portable.

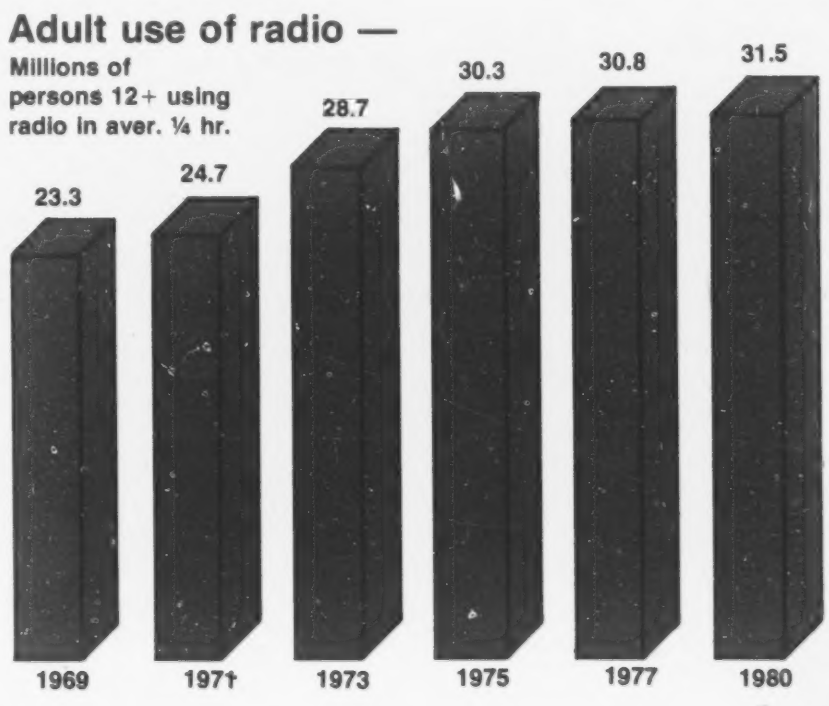
A similar concept is occuring in television. As cable television penetration has increased, the share of viewing controlled by the networks has steadily eroded. It has been assumed that this erosion would naturally continue. There is, however, the first sign that there may be a bottoming out.

In markets like New York, where several strong independent stations have been available for years, the network share has always been lower than it is nationally. As cable has penetrated these markets, however, the network share does not show the same kind of erosion patterns. Similarly in markets of heavy cable penetration, during the growth period the percent of network viewing drops sharply.

It seems that the new viewing options offered by cable tend to compete with one another rather than jousting with the networks.

In 1982 developing media patterns will continue to unfold. We will have no control over this. Whether we are prepared and ready to avail ourselves of these new opportunities will depend largely on how media research has responded. 1982 may not be a critical year for media, but it will certainly be a challenging year for all areas of media research. If media is to move into the 1980s with full strength we must have the support of and direction from media research.

Marcella Rosen



Source: Radio Advertising Bureau

AUDIENCE 82

Census count shows 37% minority growth

Complaints of "undercounts" have not fazed the U.S. Census in reporting on minorities. The following analysis of minority trends was included in remarks of Daniel B. Levine, acting director, Bureau of the Census, at June 9 Demographic Outlook Conference in Ithaca, New York. After explaining some problems encountered in the 1980 Census and admitting to 50 lawsuits, he said the Census Bureau considers the 1980 count "our most successful census."

Our final 1980 Census count was just over 226.5 million, which represents an increase of 11.4% over the 1970 Census count. This happens to be the lowest rate of growth since the Great Depression and is the harbinger of things to come. We expect even lower rates of growth not only in this decade — less than 10% — but also for the balance of the century. We see less than 7% growth in the 1990's.

We have seen, on the other hand, a rapid growth among our minority populations.

Hispanics were a rapidly growing segment, their numbers having risen 61% since 1970 to a total of 14.6 million. A number of factors contributed to this result in 1980, among them the higher birth rate and younger age distribution among Hispanics, greatly increased inmigration, improvements in census taking. We expect the Hispanic population to continue growing rapidly throughout the 1980's.

As for geographic distribution, more than 60% of the Spanish-origin population were living in three states on Census Day: California, Texas and New York. They comprised 37% of the population in New Mexico, 21% in Texas, 19% in California, 16% in Arizona, and 12% in Colorado. Hispanics have increased their numbers in some large cities to the extent that they outnumber Blacks, or are close to it, in cities like New York, Los Angeles, San Diego, Phoenix, San Francisco, and Denver. They now comprise a majority of the population in San Antonio.

Blacks also gained substantially in numbers and now total 26.5 million —a rise of 17%. Regionally, about 53% of the nation's Blacks were living in the South on Census Day. Studies based on surveys in the 1970's show that about as many Blacks moved to the South as left it during the decade halting many decades of net migration to the North and West. Blacks cur-

Largest Black markets still growing

(Black population 1970 and 1980 in SMSA's)

	1970	1980	Percent growth
New York	1,791,000	1,940,000	+8%
Chicago	1,231,000	1,428,000	+16%
Los Angeles	762,000	944,000	+24%
Detroit	761,000	890,000	+17%
Washington, D.C.	717,000	853,000	+19%
Baltimore	490,000	557,000	+14%
Newark	355,000	418,000	+18%
Houston	390,000	528,000	+35%
Atlanta	348,000	499,000	+43%
Dallas	330,000	419,000	+27%
St. Louis	379,000	408,000	+8%
San Francisco	330,000	391,000	+18%
Memphis	311,000	364,000	+17%
New Orleans	324,000	387,000	+19%
Cleveland	333,000	346,000	+4%

Source: U.S. Census

rently account for at least 20% of the population in seven Southern states. Twelve states now have Black populations of at least one million, up by four states since 1970, and half of them are in the South.

Asians and Pacific Islanders now number 3.5 million, a substantial increase over the 1970 total of 1.5 million. Most of the increase was created by immigration. On Census Day nearly 60% of the Asians and Pacific Islanders were living on the Pacific Coast and in Hawaii. This is down from 71% in 1970.

American Indians, Eskimos and Aleuts numbered 1.4 million in 1980, an increase of 71% since 1970. Much of their growth was caused by natural increase, but again, improved census procedures also produced a more complete count. One-third of this combined group lived in three states: California, Oklahoma and Arizona.

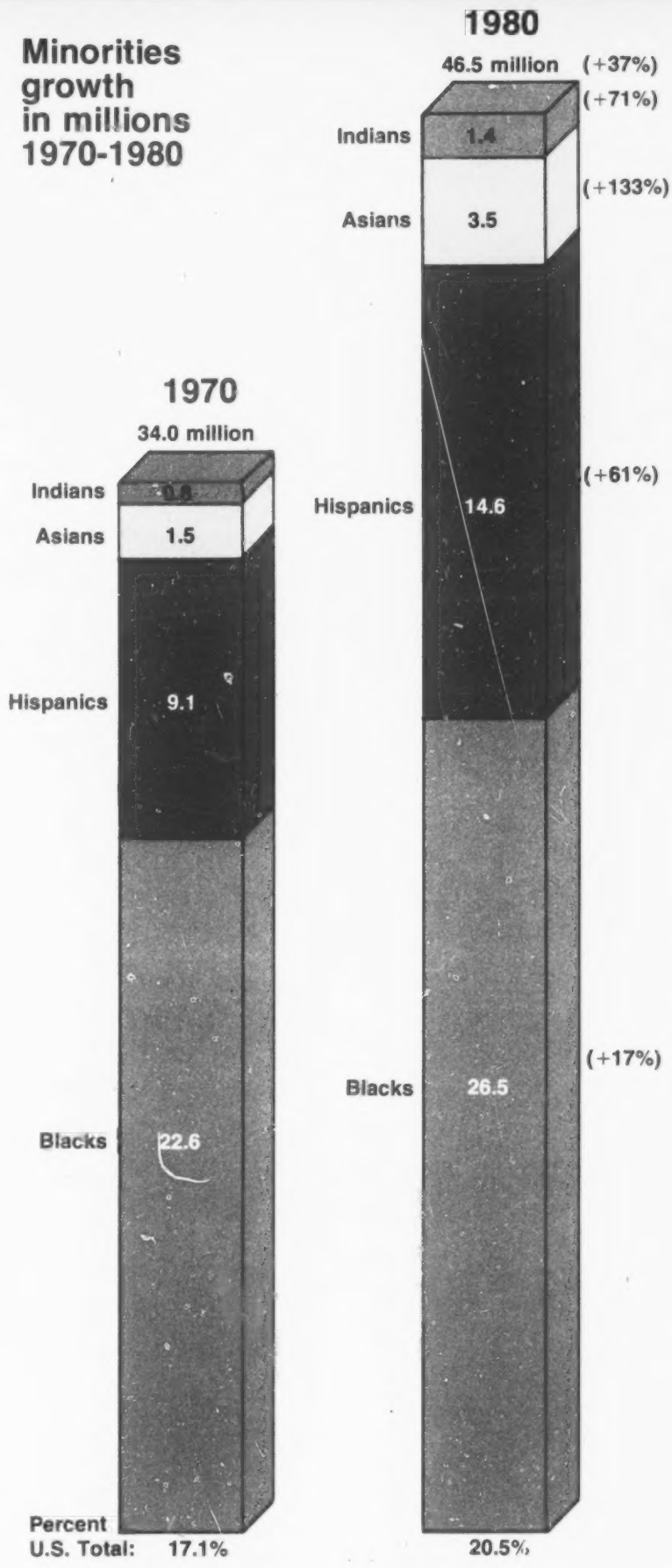
We now have figures on the age structure of the population as marked by the 1980 census. On average we have grown considerably older since 1970, the median age moving up to 30 years from 28. Three underlying factors that have influenced this aging of the population are the decline in the fertility rate since 1970, the aging of the baby boom generation and increasing longevity. Putting these trends in context, the number of children 14 years of age and younger has decreased by about 11.5% while those from 25 to 34 have increased by a substantial 48.8%.

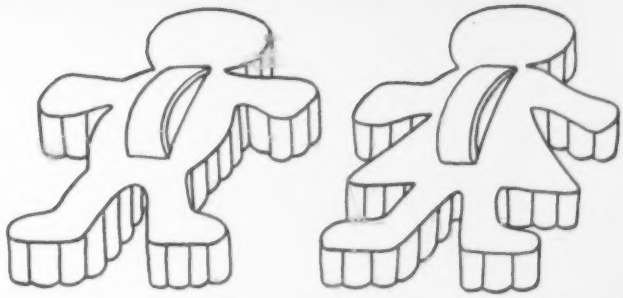
The number of persons in the age group of 55 to 64 grew 11.4%, exactly the average for the nation as a whole. But the number aged 65 and older grew by 27.9%, in part because of increased longevity.

On Census Day the White population was the oldest, at 31.3 years, followed by Asians and Pacific Islanders at 28.6. Then there is a sharp drop. The Black median age was 24.9; the Spanish origin population was 23.2; and the combination of American Indians, Eskimos, and Aleuts were slightly younger at exactly 23 years.

Among Hispanics, an age breakdown shows that nearly one-third were under 15 years old while only about 5% were 65 or older.

Daniel B. Levine





Rena Bartos, senior vp-director of communications development, J. Walter Thompson, describes the extent to which the media behavior of individuals differ because of their outlook on the world around them. She says the stereotypes into which marketers often segregate people are no longer sufficient for matching media to markets.

AUDIENCE 82

Beyond the cookie cutters

As we enter the 1980's industry pundits have sounded two themes: the revolution in media technology which will result in demassification of media, and the swift social changes which have impacted on the demography and life styles of American consumers.

While forecasts on the timetable and the extent of demassification are still rather murky, there is no doubt that social change has altered the landscape of consumer markets. Yet, there is a curious gap between the realities of social change and the picture of society reflected in many current marketing plans and advertising compaigns.

Many marketing specialists who pride themselves on their pragmatism and realism have not, as yet, related their day-to-day marketing activities to the facts of social change. Marketing procedures and tools have never been more sophisticated and complex than they are today. However, the potential contribution of those sophisticated marketing tools may be limited by the social perspective of the marketing specialists who use them.

The homogenized nature of the mass media has also limited the link be-

tween social change and advertising. While marketers are able to identify small and meaningful segments within the mass market, when it comes to reaching those segments through the media they are forced back into broad, generalized channels of communication.

We have heard a series of marketing buzz words over the years. In the 1960's we heard a great deal about *positioning*. In the 1970's, *segmentation* was on everyone's lips.

When positioning and segmentation were translated into media buys, the sharp discriminators of marketing analyses were blunted by being forced into the homogenized channels of mass media.

No matter how sharply our target segmentation analyses led us to very discriminating definitions of target consumers, those target definitions were forced into a few simplistic cookie-cutter patterns usually based on one or two demographic characteristics. These were:

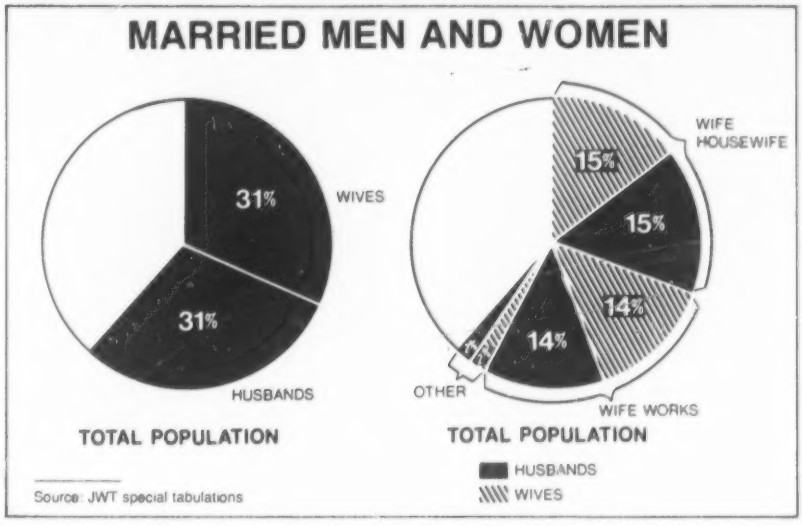
- The familiar "any housewife, eighteen to forty-nine,"
- The universal "any male head of household, twenty-four to forty-nine,"
- The "any young woman, eighteen to twenty-four,"
- Or "any young man, eighteen to thirty-four."

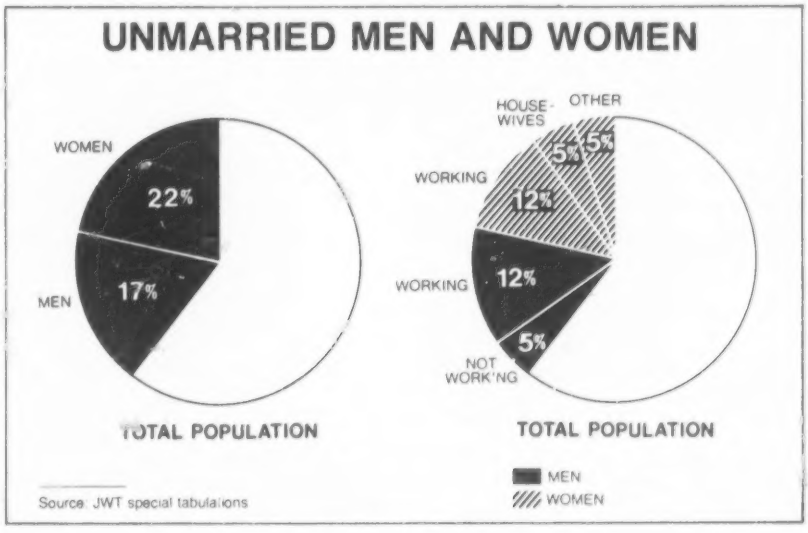
Occasionally, these were tempered by an income requirement for big-ticket items or a usage requirement.

The one characteristic that all these marketing targets have in common is that no one is ever over forty-nine years of age. Apparently, marketers take for granted the conventional wisdom that brand choices are formed early and that younger families represent higher volume potential. Therefore, the most desirable customers are under thirty-five. In some cases, the age target may go up as high as forty-nine.

This way of defining consumer targets is a static and monolithic view of our society. It assumes that everyone is cut out of a few cookie-cutter patterns and that nothing really changes.

Marketing and media programs built on this kind of perspective cannot reflect the diversity of life style groups in our society nor can they be responsive to the dynamics of changing value systems which, in turn, lead to changing behavior in the marketplace.





The media have catered to this obsession with cookie-cutter demography by talking about what "great demographics" a particular publication or a particular program can deliver.

The demographics were usually expressed in terms of the youth or, occasionally, the income levels of the audience of that medium.

We should think of the different life style groups in our country as representing a mosaic of targets that differ in their product wants and needs and in their value potential to the marketer.

The key to unlocking this jigsaw puzzle lies in a combination of old and new demographic facts and in changing attitudes. This information provides clues to change and how to keep up with it. The demography is so basic it is almost simplistic. It consists of such straightforward facts as marital status, presence of children, age, sex, and occupation.

These simple demographic facts are intertwined with changing attitudes and philosophies of life that influence the way consumers respond to products and to media. Most of the keys to keeping up with change are available to all of us. Any practical-minded marketer can challenge the underlying assumptions on which past definitions of the market are based and learn whether those assumptions are out of date, and if needed, bring his or her marketing procedures in step with the realities.

Of course, the line question is how this new perspective on consumers impacts on their behavior in the mar-

ketplace. An equally important question is how it impacts on the way they respond to media. More importantly, is it possible at the present state of the art to differentiate among them?

Media use by 4 consumer segments

I believe that we can tease out the media usage patterns of the various life cycle groups by reanalysis of syndicated media data. A brief overview of the media behavior of four of these changing consumer segments includes: Women, Husbands And Wives, The Unmarried and Over Forty-Nine.

This will be based on heavy users (top quintile) of six types of media. Even this broad stroke comparison reveals that these segments do have very distinctive ways of using media. In the interest of space I will not go beyond this overview comparison. However, an examination of day part, program type, station type, and category of magazine reveals profiles of each segment as distinctive as a signature.

Women

There is one simple demographic fact that is the basis of a quiet revolution: the dramatic rise in the number of women in the United States who go to work.

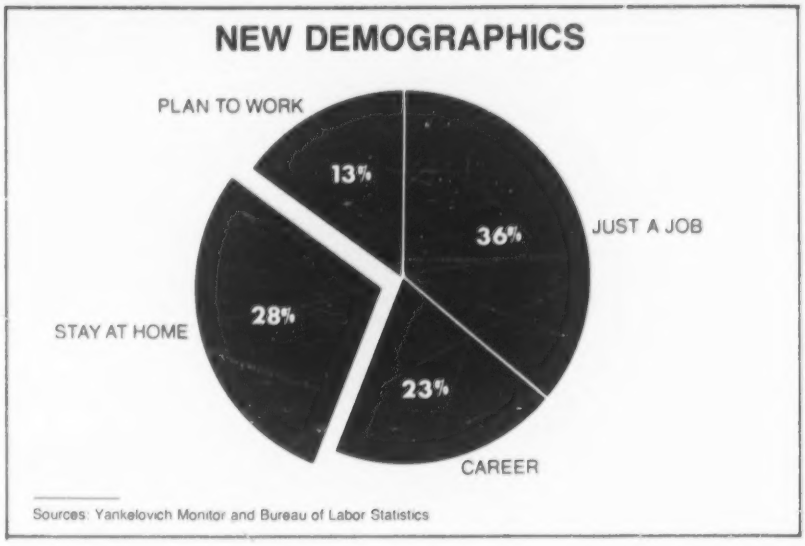
In 1980 fifty-two percent of all females in the United States sixteen years of age and over were in the work force. Only thirty-seven percent of all women were full-time housewives. The remaining are out of the mainstream: they are either still in school or retired or disabled.

Once we remove the schoolgirls and the grandmothers from the picture, the ratio of working women to housewives is fifty-nine to forty-one percent. However, there is such diversity among both working women and housewives that it would be too simplistic to treat these two categories of women as though they were monolithic groups.

A meaningful way of segmenting these two groups of Women emerged from a pair of questions asked by the Yankelovich Monitor.

(1) Housewives were divided into those who do not plan to go to work and those who do. We designate these as *stay-at-home* and *plan-to-work* housewives.

(2)Working women were divided into those who consider their work *just a job* and those who are *career oriented*.



I have termed this way of dividing the women's market as "The New Demographics." Since 1975 these questions have been incorporated in most major media sources. They were first used by the Target Group Index. When that company was reorganized into the Simmons Market Research Bureau the questions were continued. At the present time Mediamark Research Inc. also uses the questions. In addition, they are used by the Canadian media Service, Print Measurement Bureau.

For the past six years we have been able to forge a link between our speculations about these groups of ladies and their actual behavior in the marketplace. We have learned some new facts about the New Demographics. They differ from each other demographically, psychologically, and in their marketing behavior. They differ just as sharply in their media behavior!

- It is not surprising that both sets of housewives are heavy viewers of daytime tv. We were somewhat surprised that *plan-to-work* housewives who are younger and more outward bound in their interests have their sets tuned in even more frequently in the daytime than their *stay-at-home neighbors*. Clearly, daytime tv is no way to reach working women, either job or career.

- Presumably all women are available to watch tv during the evening hours. However, the two groups of housewives are the heaviest viewers of primetime tv, with *plan-to-work* housewives even more avidly glued to the tube than their *stay-at-home* neighbors. Just-a-job working women are just over the norm in heavy viewing of primetime tv and career women are just under the norm.

- When it comes to radio, the picture is different. Both job and career working women are more likely to listen to radio then their housewife counterparts. *Plan-to-work* housewives are far more likely than *stay-at-home* to be heavy radio listeners. The two working women groups tend to listen to radio during drive time as much as men do.

- If there is any doubt that working women are not all cut out of the same mold, their response to print media tells the story. Career oriented working women are by far the heaviest readers of magazines. As a matter of fact, they are heavier readers than men, and they read a great many magazines of all categories. They are seconded in this not by their just-a-job working colleagues but by the *plan-to-work* housewives. These *plan-to-work* housewives are very responsive to all media. They tend to echo career women in the way they buy and use products.

- There is a real differentiation in the way women respond to newspapers. Both types of housewives are likely to be below the norm in heavy

reading of newspapers. There is a spectrum of response across the four New Demographics: *stay-at-homes* are least likely to be heavy readers of papers and career women are most likely to do so.

• Response to outdoor advertising also reflects the way lifestyle impacts on media. The two types of working women are far more likely to be out in their cars and exposed to outdoor advertising than either of the housewife groups. While they are far below the norm, *plan-to-work* housewives are more likely than their *stay-at-home* neighbors to be out driving where they see billboards.

Another simple demographic fact which provides clues to change is the concept of life cycle. People simply change as consumers as they move in and out of different stages in life and so do their wants and needs in relation to products and services. Are they married or not? Are there any children around the house? These two simple demographic facts are basic to people's marketing and media behavior and crucial to understanding their potential as customers.

Sixty-two percent of all adults in the United States are married and in almost half of those households the wife is in the work force. How does the fact that the wife goes to work affect the way the family lives and how they use media?

Husbands and housewives

First, let's take a look at the husbands and wives in the households where the wife is a fulltime homemaker.

• As we saw earlier, both types of housewives are above the norm of all women in watching both daytime and primetime tv. Therefore, it is not surprising that these married stay-at-home and plan-to-work housewives follow that pattern. We would not expect their husbands to see much daytime tv, and they don't. However, they are not nearly as avid fans of primetime tv as their wives appear to be.

• Both types of housewives are far more likely than their husbands to be heavy magazine readers. Plan-to-work housewives are even more involved with magazines than their stay-at-home neighbors. In both cases their husbands are below the norm in heavy magazine reading.

• On the other hand, the husbands are heavy readers of newspapers and are very likely to see a lot of outdoor advertising. Their wives, on the other hand, are far less likely to be heavy newspaper readers or to see advertising on the highway.

Husbands and working wives

What are the differences in the media behavior of the husbands and wives in the two-paycheck households?

• As might be anticipated, daytime tv is no way to reach the two-paycheck couple, although the wives do somehow get to see daytime tv more than their husbands do. Husbands are less likely to watch primetime tv than their wives. Only just-a-job working wives are above the norm in heavy tv viewing in the evening.

• We saw earlier that career women are heavy magazine readers. This pattern continues among career wives. Married just-a-job working women are above the norm in supporting magazines, but not nearly to the same extent as their career sisters. Men with career wives are far more likely to read magazines than any of the other groups of husbands. However, their readership is not nearly as intense as that of their wives.

• On the other hand, career husbands are the heaviest readers of newspapers. Career wives are also far above the norm in reading newspapers. They are followed by the husbands of just-a-job working women. The latter wives are just under par in newspaper reading.

• Both husbands and wives in both types of two-paycheck households see a great deal of outdoor advertising. In both cases the husbands see more of it than their wives.

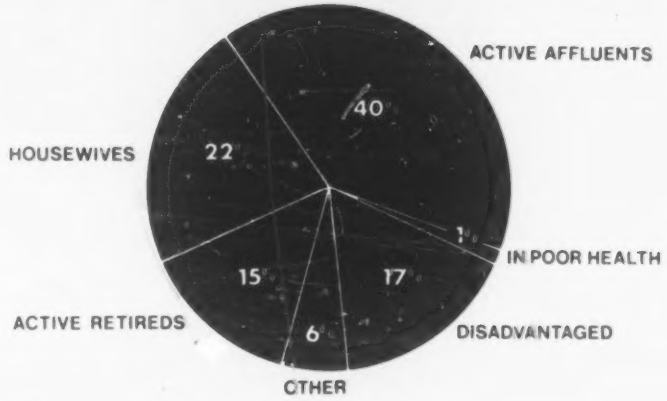
The unmarrieds

Thirty-nine percent of American adults are not married. They represent the single women and bachelors who have never married, the divorced, the separated, and the widowed. And thirty-four percent have neither spouse nor child in their lives. But their numbers don't tell the whole story. Many of them represent a major change in attitudes and life styles. The tendency toward delayed marriage or nonmarried living arrangements and the tendency toward delayed families or to no children at all suggest profound social changes that will affect the structure of families in the future.

Remember, nothing is forever. Unmarried people have a way of getting married or re-married or even re-re-married! Somewhere I heard a statistic, which I can't vouch for, that four out of five divorces end in marriage.

And not all people without spouses are necessarily swinging singles. The unmarrieds cluster at both ends of the spectrum and, of course, the consumer needs and media interests of the two

PROFILE OF PEOPLE OVER 49



Source: JWT special tabulations

age groups are very different. Let's take a look at how unmarried women and men who are actively in the work force select and use media.

- Unmarried men are particularly unlikely to view daytime tv, and they are not very heavily represented in the primetime audience. Unmarried working women, both job and career, are below par in watching tv during the day. They are just under the norm in watching tv during the evening.
- Both unmarried men and women are particularly responsive to radio. All three segments are stong fans of radio. There is no time to go into detail here, but clearly an analysis of the types of stations they listen to could help an advertiser do some very fine/tune segmenting even at the present state of the art.
- Following the pattern we saw earlier, unmarried career women are the heaviest supporters of magazines. Unmarried men and just-a-job working women are just over the norm in heavy readership of magazines.
- Career women and unmarried men are also over the norm in heavy reading of newspapers. They aren't quite as strong supporters of newspapers as their married counterparts.
- Clearly, all three groups are out and around in their cars. They are all above the norm in seeing outdoor advertising. Career women and unmarried men are equal in this. While just-a-job working women are above the norm, they are less likely than the other two unmarrieds to see a great deal of outdoor advertising.

Over forty-nine: the invisible consumers

With modern health care and early retirement, there are many able-bodied, young old people whose life styles are changing and whose consumer needs have changed. Most marketing managements set their sights at targets under forty-nine years of age and tend to ignore the fact that there are many active, valuable customers aged fifty and over. The Over Forty-Nine market is not only invisible, it is not a monolithic market at all. The greatest mistake any marketer can make is to generalize about "senior citizens" or "older Americans" as a group.

The watershed events that occur after forty-nine are retirement, empty nest, loss of a spouse, and ill health. Time, money, and health are also keys to defining the marketing segments concealed within the invisible market of Over Forty-Nine. Considering the watershed facts of their lives and the objective facts of time, money, and health, we have identified several distinct segments among the invisible market of Over Forty-Nine. The three groups that have real potential as customers are: the Active Affluents, the Active Retireds, and the Housewives.

The way they behave in the marketplace and their selection of media is evidence of their diversity. There are two marketing questions that help define these segments: how do they spend their time? and how do they use media?

- Neither men nor women among the Active Affluents who are still in the work force or the Active Retireds are particularly heavy viewers of primetime tv. They are all below the norm. Among housewives, only the wives of the Active Affluents are slightly above par. Wives of retired husbands are least likely to watch primetime tv.
- The story is somewhat different during the day. Retired men are just at the norm in heavy viewing of daytime tv, while retired women and all three types of housewives are strong fans of tv during the day.
- None of the Over Forty-Nine segments are apt to be very involved with radio. They are all below the norm in being in the top quintile. This is in sharp contrast to the unmarried men and women who are still in the work force for whom radio is a very potent medium.
- The pattern we saw earlier of women being very supportive of magazines is echoed among the Over Forty-Nine's. The Active Affluent women who are still in the work force are heavy magazine readers as are the housewives who are married to Active Affluent men. While the wives of retired men may not watch much tv in the evening or listen to their radios, they do read magazines a great deal. The unmarried housewives who are predominantly older widows are least likely to be magazine readers.
- Both men and women Active Affluents are strong supporters of newspapers. This is the one medium in which men outstrip the women. The wives of those Active Affluent men are also heavy newspaper readers.
- Active Affluent men are the only segment among the Over Forty-Nine who are likely to see a great deal of outdoor advertising. Active affluent women are just under the norm. Neither retired men and women nor housewives are likely to see very much outdoor advertising. Apparently, they aren't out in their cars as much as the Active Affluent men.

Social change is redefining consumer targets in our country. Every change in society alters the context of people's lives and that changing context creates new marketing opportunities. This brief overview of their media behavior shows how consumers find their own patterns among the choices presently available among the mass media.

The revolution in media technology promises new, exciting potential for advertisers. In the 1980's we will move from the homogenized, broad stroke channels of mass media to an array of segmented communication opportunities which have been labeled "demassification." At long last we will be able to match the marketing segments that we identify through analysis of social change to new, increasingly discriminating media channels.

The days when the media planner listened politely to some abstract definition of marketing segments and then proceeded to force it all into the cookie-cutter mold of "any housewife, eighteen to forty-nine" are gone.

The two most overworked words in marketing are "challenge" and "opportunity." And, yet, I can think of no other way to describe the media potential of the 1980's. We have heard a great deal about the media revolution and demassification. At long last we will be able to link our media to the marketing opportunities offered by the many segments in the consumer marketplace that lurk behind the cookie cutters.

Will we meet the challenge? Or will it be business as usual?

Rena Bartos

PEOPLE 82

Areas of change in '82

Decisions surveys of company marketing managers and agency media directors reveal where they expect to find most change in media. Also of concern: how to police excesses in sex and violence and other matters of moral import.

Elsewhere in this issue, Gus Priemer of S.C. Johnson points out that "most advertising people see the new video technology as their industry's great challenge for the 1980's." Debunking the attention and analysis currently devoted to the new video technology as a red herring, about the size of Moby Dick. We may agree on the magnitude, but not on the substance."

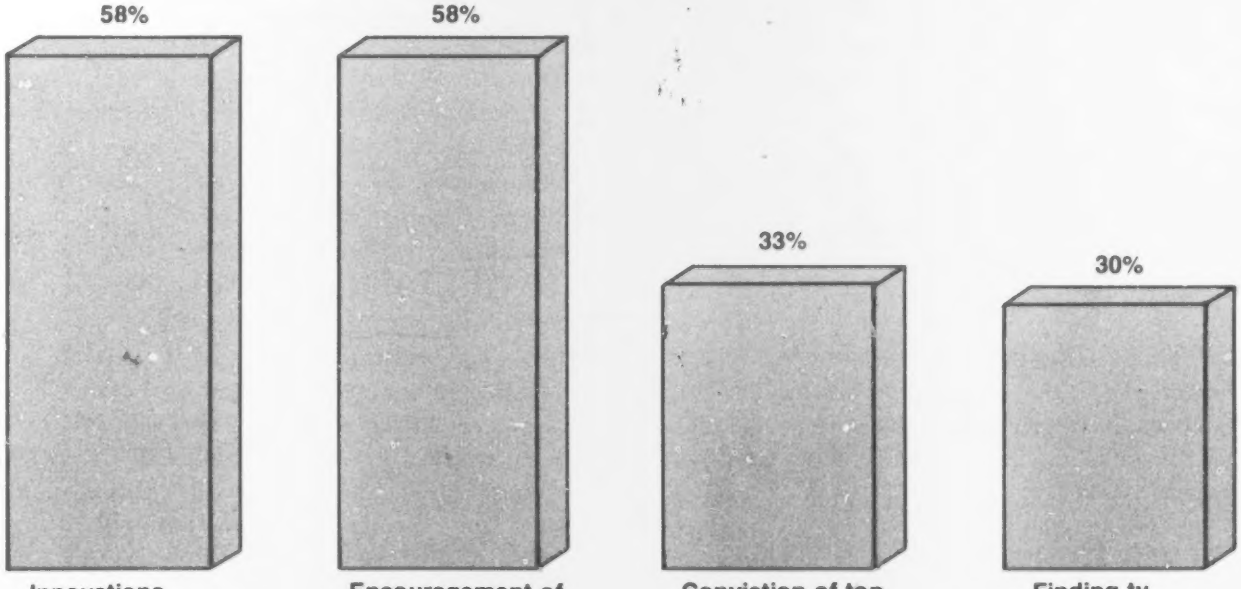
However, most media people think otherwise. A *Decisions* survey of advertisers whose products make up our Top 200 Millionaire Brands, and of their agencies, reveals that use of the new electronic media as an advertising vehicle is indeed a top priority for 1982, and one that is being taken seriously at every level of the business.

The survey queried agencies and advertisers on a half-dozen areas of change pinpointed by *Decisions* editors, leaving open the option for a quick, multiple-choice response, or more in-depth write-in comments from which quotations below are drawn.

The subject of new electronic media was rated as a key issue for 1982 by 77% of respondents; 14% said the new media won't be a particularly important challenge for media people next year.

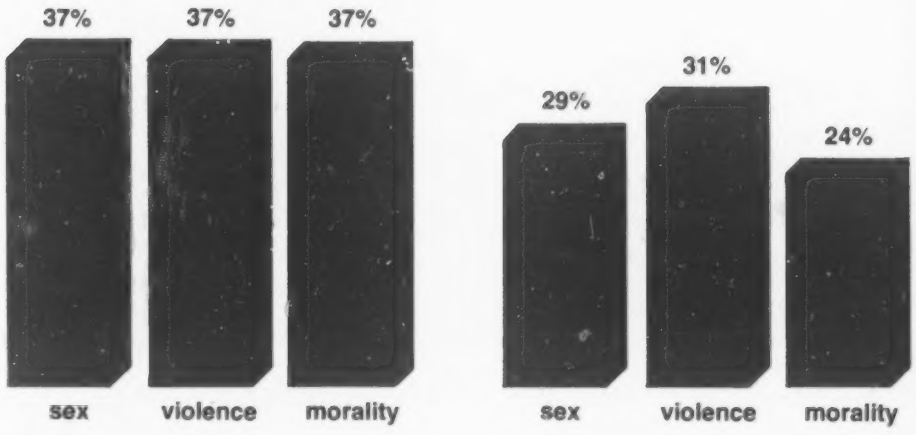
On the advertiser side of the busi-

Advertisers say: these will be key areas of change in 1982



Source: Decisions survey of marketing managers.

Advertisers and agencies say: 1982 tv program standards should include judgments on —



Source: Decisions surveys of marketing managers and agency media directors

medium will no longer be a cliche, it will be the only way to assure the advertiser that his message has a chance of survival. Media people must recognize the opportunity and seize the moment."

The agency preoccupation with new media also emerged in another part of our survey. Asked to pinpoint the media in which more planning and buying expertise is needed, cable was mentioned by 74%, followed by magazines, with 47% mentioning. After cable and magazines, 37% of media directors felt more expertise was needed in newspaper planning and buying, 37% felt more skill is needed in outdoor, and 26% thought a better understanding of radio planning and buying is in order for 1982.

Another subject that rates high concern at agency media departments is finding effective, meaningful ways to measure audience response to advertising. A full 77% said this will be a priority issue next year.

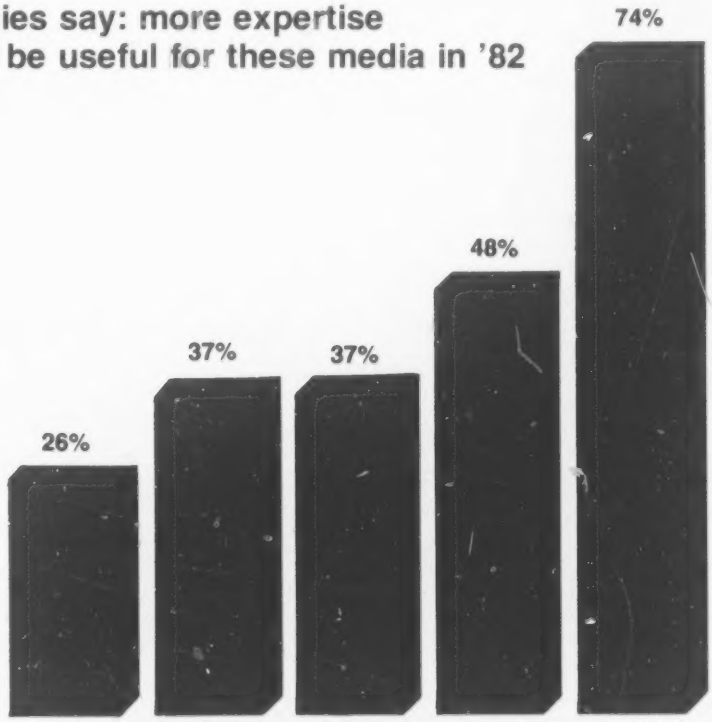
Said Mark Oken, senior vp/media director at The Bloom Agency in Dallas: "While this is a year of media change, we believe that business for the most part will continue as usual. Nevertheless, a major challenge will be concentrating more than ever on finding and testing new ways to maintain advertising/sales effectiveness in the face of ever increasing costs."

Attacking the problem from a slightly different angle was Henry Platek, vp/media director at Carr Liggett Advertising in Cleveland, who said determining proper frequency levels will be the key issue of effective ad campaigns next year: "How much advertising — reach and frequency — does it take to work properly? I think there are too many 'minimal' efforts — illusions of campaigns — going on now, which aren't paying off.

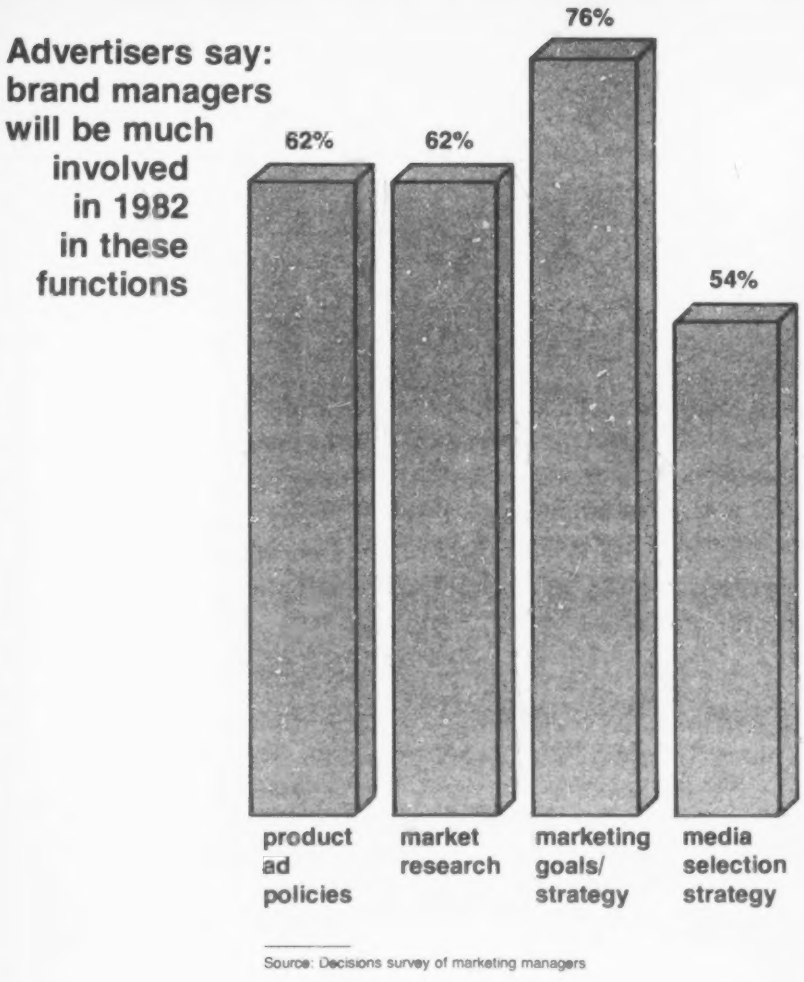
"We have to determine what are *maximum, average* and *minimum* volumes. Anything below minimum is wasted. Thus, an advertiser must recognize that he has to invest a certain number of dollars, attain a certain level of frequency, to achieve entry level into the advertising arena."

Another often-mentioned challenge

Agencies say: more expertise would be useful for these media in '82



Source: Decisions survey of agency media directors



Source: Decisions survey of marketing managers

for media is developing a marketing-based perspective in planning advertising. But this was an area where some difference of opinion emerged between agency and advertiser in our survey. Seventy-seven percent of agency respondents agreed that "developing marketing-based perspective on media planning" was an important challenge for 1982, with 11% disagreeing.

On the advertiser side, only 58% saw this as important, with 29% saying this would not be an important consideration in evaluations of their agency media department's work.

Another difference of opinion emerged over one of the hottest subjects of the past year — quality programing standards. There was noticable variance in the concern expressed over the amount of sex and violence in programs that advertisers will be sponsoring next year, and about the "morality issues" that were stressed in 1981 by pressure groups such as the Coalition for Better Television.

Advertisers were somewhat split on the issue. Fifty percent agreed that "Finding programing that meets standards of quality" would be a key problem for 1982, with 45% disagreeing on this matter.

On the agency side, only 40% felt that "finding television programing that meets clients' standards of quality" would be important next year, with 38% disagreeing.

On the agency side, of those who felt quality programing would be important, 31% said violence would be of most concern; 29% noted that sex was the problem; and 24% cited morality issues.

Advertisers reacted evenly to all three of these categories. Of those concerned about the problem, 37% pointed to violence, sex and morality as problem areas. *Mark Miller*

Tampa Bay is the Fastest Growing Major Metro Market in the Southeast

. . . growing faster than Miami and Atlanta. Believe it! There is more than $1.4 billion in commercial construction now under way in the City of Tampa alone. The dynamic Tampa Bay market is comprised of Hillsborough, Pasco and Pinellas Counties. Be sure your print schedules include these powerful newspapers.

THE TAMPA TRIBUNE
Morning and Sunday
The Tampa Times
Evening and Sunday

Media General Newspapers
Represented by Sawyer-Ferguson-Walker
Contact:
Byron Taggart, General Advertising Manager
P. O. Box 191, Tampa, Florida 33601
(813) 272-7447

Source: S&MM Survey of Buying Power, 1980

Top 20 Metro markets — how they're growing

The top 20 U.S. metro markets house 38% of the total U.S. population, as counted by the 1980 Census.

They're still growing — up 5% since the previous Census in 1970. But total U.S. population is growing faster — up 11% since 1970.

The large metros offer the most condensed targets for marketers and media. But the areas outside the metros (rural, small towns and exurbs) moved up from 54% of U.S. population in 1970 to 56% in 1980.

The markets in the table below are as defined by the U.S. Census in 1980: SCSA's (Standard Consolidated Statistical Areas) or SMSA's (Standard Metropolitan Statistical Areas).

We have also followed the Census definition of suburbs — areas outside central cities but within either SCSA's or SMSA's. Elsewhere in this issue we have added a non-Census definition for exurbs, fast-growth areas outside SMSA's but in counties abuting the SMSA counties.

The fastest growing metro markets — with the exceptions of Miami and Houston — are not among the 20 largest. As demonstrated on page 39, the top 25 metros in terms of growth 1970-1980 are concentrated in the South and West.

Ten of the fastest growth SMSA's are in Florida: Miami/Ft. Lauderdale/Hollywood; Ft. Myers/Cape Canaveral; Sarasota; West Palm Beach/Boca Raton; Orlando; Bradenton; Daytona Beach; Tallahassee; Tampa/St. Petersburg; Lakeland/Winter Haven.

Five of the fast-growers are in Texas: Houston; Bryan/College Station; McAllen/Pharr/Edinburg; Brownsville/Harlingen/San Benito; Austin.

Two, Phoenix and Tucson, are in Arizona. Two are in Nevada: Las Vegas and Reno. Two are in California: Santa Cruz and Santa Rosa.

Four other western states have one each: Richland/Kennewick/Pasco in Washington; Fort Collins in Colorado; Provo/Orem in Utah; Boise City in Idaho. All of these grew over 40% between the 1970 and 1980 Census.

The greatest losers among SMSA's in the ten year period between Census readings were: New York (down 9% for the SMSA and 6% for the Consolidated New York/New Jersey/ Connecticut area); Cleveland (down 8%; Boston (−5% in the SMSA, although the exurbs of Boston are the fastest growth area in New England); Pittsburgh (−6%); Buffalo (−8%); Utica/Rome (−6%); Stamford, Conn. (off 4.5% in population as the area switched from residential to business — and the people moved into Stamford's exurbs); Pittsfield, Mass. (−6.5%).

The 284 SMSA's listed by the Census grew as a whole 9.4% between Censuses, with the suburban segments of those SMSA's growing 17.4%.

Growth by Census region exhibited some sharp contrasts: plus or minus zero change in the Northeast, up 3.7% in the North Central states, up 19.1% in the South, and 23.4% in the West.

The SMSA's that moved up in rank were: San Francisco (from sixth to fifth), Houston (from thirteenth to eighth), Dallas (from twelfth to tenth), Miami (from sixteenth to twelfth), Atlanta (from No. 19 to No. 18), San Diego (from 21st to 19th), Denver (from 24th to 21st), Tampa (from 26th to 32nd), Portland, Oreg. (from 29th to 27th).

Percent total U.S. population in 10 largest Metro areas